

COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Purpose of Amendment (describe the reason for amending original submission): Post-travel submission
must be amended with the Office of Public Records in SH-232.

(Date)

(Signature of Traveler)

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Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☐ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)
The Pew Charitable Trusts

Private Sponsor(s) (list all): _____

Travel date(s): September 15-17, 2017

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$112.91	\$286.00	\$112.00	
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): **See Attached**

9/21/17 **Matthew Sandgren**

(Date)

(Printed name of traveler)

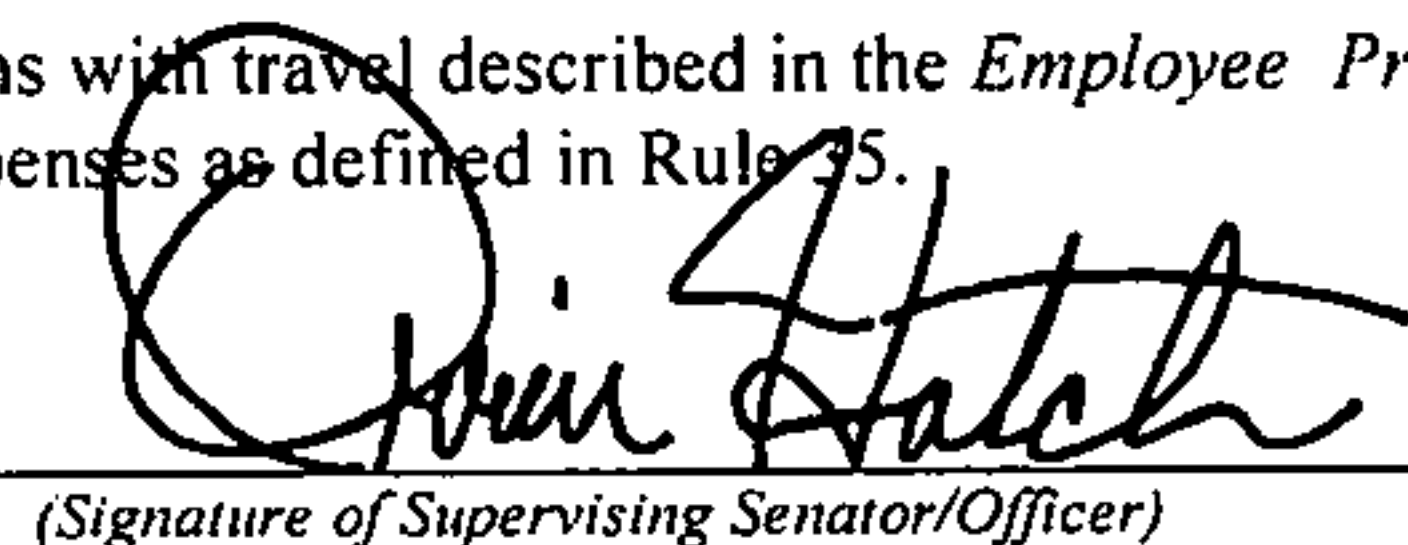

(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

9/21/17

(Date)


(Signature of Supervising Senator/Officer)



Conference Schedule

2:30pm	Depart Union Station via Amtrak 95 (coach fare)
5:15pm	Arrive Main Street Station, Richmond
5:30pm	Travel via bus to Jefferson Hotel, 101 W. Franklin Street
5:40pm	Arrive Jefferson Hotel, check in (GSA per diem rate)
7:30-9:30pm	Dinner with keynote speaker Historian Alexander Rose , author of <i>Washington's Spies: The Story of America's First Spy Ring</i> (now the TV show "Turn: Washington's Spies). Review agenda and goals of conference. (Empire Room)

8:30-9:30am	Breakfast at your leisure, Jefferson Hotel (Rotunda)
9:30-11:30am	Breakthrough Communication: Navigating High-Stakes Conversations, Peter and Susan Glaser Communication skills are the first step in developing strong relationships, making quality decisions, and creating high performance teams. But, most importantly, communication can serve as a tool to constructively manage conflict. This training is rooted in the Glasers' 39 years of field-tested and published research on interpersonal communication and leadership development. Participants learn communication models to understand and transform high-stakes conversations into a powerful and effective stimulus for change. (Grand Ballroom)
11:30am-12:00pm	Break
12:00-1:15pm	Lunch with speaker Larry Sabato , the University of Virginia. (Ginter Gallery)
1:15-2:30pm	State of the News Media, Amy Mitchell, Pew Research Center Eight years after the Great Recession sent the U.S. newspaper industry into a tailspin, the pressures facing America's newsrooms have intensified to nothing less than a reorganization of the industry itself, one that impacts the experiences of even those news consumers unaware of the tectonic shifts taking place. Amy Mitchell will brief chiefs on the annual "State of the News Media" report and its implications on public policy. (Grand Ballroom)

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2:30-2:45pm

Break

2:45-3:45pm

How Technology, Robotics and Automation May Affect the U.S. Economy in the Future, David Pogue, Yahoo Technology

David Pogue is the tech critic for Yahoo Finance, and was previously the personal-technology columnist for the New York Times for 13 years. He's also a monthly columnist for Scientific American and host of science shows on PBS's "NOVA," and a correspondent for "CBS Sunday Morning" since 2002. (Grand Ballroom)

6:00pm

Buses depart for Governor's Mansion

6:15pm

Arrive Governor's Mansion, Capitol Square

6:30-8:00pm

Reception - Remarks by Gov. Terry McAuliffe

8:00pm

Buses Depart for Jefferson Hotel

Sunday, September 17, 2017

8:00-9:00am

Breakfast at your leisure, Jefferson Hotel - Bag Call (Empire Room)

9:05-9:15am

Greeting from Senator Tim Kaine (Grand Ballroom)

9:15-10:15am

It's the Economy - Bill McInturff, Public Opinion Strategies, and Geoff Garin, Hart Research

Pollsters McInturff and Garin will explore Americans' attitudes and views regarding jobs, the economy and the current state of the "American Dream" to better inform chiefs of staff as they tackle legislation in these areas. (Grand Ballroom)

10:15-12:00pm

Presidential Recordings – The Executive/Legislative Branch Relationship Through History, Marc Selverstone, the Miller Center at UVA

To assist chiefs in gaining a better understanding of effective working relationships between the legislative and executive branches, this session will explore the interactions between the president and Senate leadership over the years through the Miller Center's exhaustive collection of Oval Office recordings from Kennedy through Nixon. (Grand Ballroom)

12:00pm

Pick up box lunches

12:15pm

Buses depart Jefferson Hotel for Washington

3:00pm (approx.)

Arrive Union Station parking garage

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Matthew Sandgren

Name of Traveler: _____

Senator Orrin Hatch

Employing Office/Committee: _____

The Pew Charitable Trusts

Private Sponsor(s) (list all): _____

September 15-17, 2017

Travel date(s): _____

Note: If you plan to extend the trip for any reason you must notify the Committee

Destination(s): Richmond, VA _____

Explain how this trip is specifically connected to the traveler's official or representational duties:

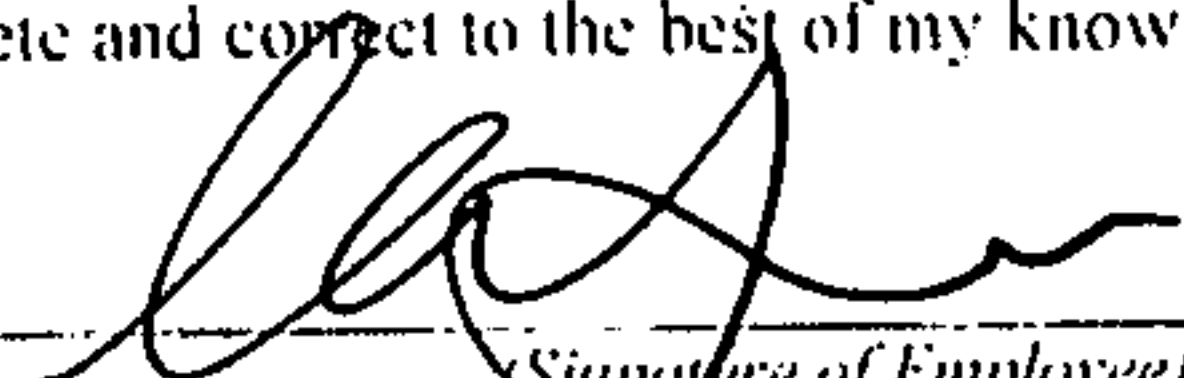
As my role of Chief of Staff I will learn new leadership and management techniques to implement and how to better communicate with the executive branch. The leadership training will help improve my quality decision making and working relationships as Chief of Staff.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9-5-17
(Date)


(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Orrin G. Hatch

Matt Sandgren

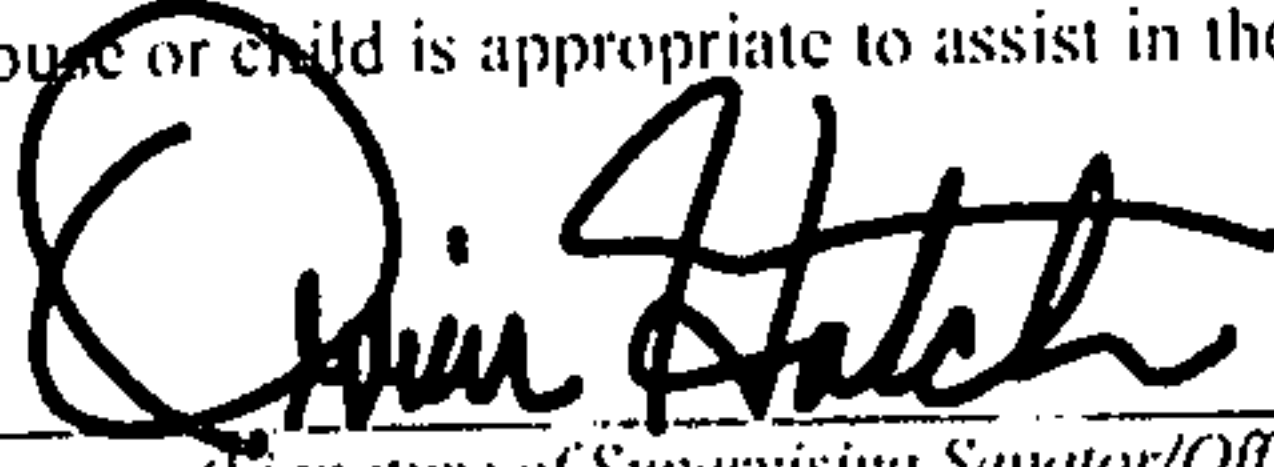
I, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

9/5/17

(Date)


(Signature of Supervising Senator/Officer)

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The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

- Private Sponsor Certification - Page 1 of 4

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Pew Charitable Trusts is the sole organizer and sponsor of this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attachment.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

See attachment.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$73.57/roundtrip	\$286	\$128	
<input type="checkbox"/> Actual Amounts	\$44.51/local transportation			

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Richmond was selected due to its close proximity to Washington, DC and its historical significance.

19. Name and location of hotel or other lodging facility:

The Jefferson Hotel, 101 W. Franklin Street, Richmond, VA 23220

20. Reason(s) for selecting hotel or other lodging facility:

The Jefferson Hotel can provide the necessary meeting space for the planned seminars and can provide the required number of guest rooms to accommodate the group.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are at the per diem rate for Richmond, VA.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Transportation to Richmond will be provided via Amtrak using the lowest coach fare. Transportation back to Washington, DC, will be via coach bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor:



Name and Title: David Gilliland, Officer

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, 10th Floor, Washington, DC, 20004

Telephone Number: (202) 552-2145

Fax Number: (202) 552-2299

E-mail Address: dgilliland@pewtrusts.org

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- 1-10. See form
11. See attachment.
12. See form.
13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the sixth Senate chiefs of staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.
16. See form.
17. See form.
18. See form.
19. See form.
20. See form.
21. See form.
22. See form.
23. See form.
24. See form.
25. See form.



Historic
Richmond, Virginia

Bipartisan Senate Chiefs of Staff Conference

Senate Chiefs of Staff Conference Itinerary

Richmond, Virginia / September 15-17, 2017

Friday, September 15, 2017

2:30pm Depart Union Station via Amtrak 95 (coach fare)

5:15pm Arrive 30th Main Street Station, Richmond

5:30pm Travel via bus to Jefferson Hotel, 101 W. Franklin Street

5:40pm Arrive Jefferson Hotel, check in (GSA per diem rate)

7:30-9:30pm Dinner with keynote speaker **Historian Alexander Rose**, author of *Washington's Spies: The Story of America's First Spy Ring* (now the TV show "Turn: Washington's Spies). (We will also review of the goals of the weekend conference agenda.)

Saturday, September 16, 2017

8:30-9:30am Breakfast at your leisure, Jefferson Hotel

9:30-11:30am

Breakthrough Communication: Navigating High-Stakes Conversations, Peter and Susan Glaser

Communication skills are the first step in developing strong relationships, making quality decisions, and creating high performance teams. But, most importantly, communication can serve as a tool to constructively manage conflict. This training is rooted in the Glasers' 39 years of field-tested and published research on interpersonal communication and leadership development. Participants learn seven communication models to understand and transform high-stakes conversations into a powerful and effective stimulus for change.

11:30am-12:00pm	Break
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12:00-1:15pm Lunch with speaker **Larry Sabato**, the University of Virginia.

1:15-2:30pm **State of the News Media, Amy Mitchell, Pew Research Center**
Eight years after the Great Recession sent the U.S. newspaper industry into a tailspin, the pressures facing America's newsrooms have intensified to nothing less than a reorganization of the industry itself, one that impacts the experiences of even those news

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Management and Leadership Conference

September 15-17, 2017

Senator	State	First	Last	
Alexander	TN	David	Cleary	
Baldwin	WI	Bill	Murat	
Barrasso	WY	Dan	Kunsman	
Bennet	CO	Jonathan	Davidson	
Blumenthal	CT	Laurie	Rubiner	
Blunt	MO	Stacy	McBride	
Booker	NJ	Matt	Klapper	
Boozman	AR	Helen	Tolar	
Brown	OH	Sarah	Benzing	
Burr	NC	Natasha	Hickman	
Cantwell	WA	Travis	Lumpkin	
Capito	WV	Joel	Brubaker	
Cardin	MD	Chris	Lynch	
Carper	DE	Bill	Ghent	
Casey	PA	Kristen	Gentile	
Cassidy	LA	James	Quinn	
Cochran	MS	Brad	White	
Collins	ME	Steve	Abbott	
Coons	DE	Adam	Bramwell	
Corker	TN	Todd	Womack	
Cornyn	TX	Beth	Jafari	
Cornyn	TX	Monica	Popp	
Cortez Masto	NV	Scott	Fairchild	
Cotton	AR	Doug	Coutts	
Crapo	ID	Susan	Wheeler	
Cruz	TX	David	Polyansky	
Daines	MT	Jason	Thielman	
Donnelly	IN	Joel	Elliott	
Duckworth	IL	Kaitlin	Fahey	
Duckworth	IL	Kalina	Bakalov	
Durbin	IL	Patrick	Souders	
Enzi	WY	Tara	Shaw	
Ernst	IA	Lisa	Goeas	
Feinstein	CA	Steve	Haro	
Fischer	NE	Joe	Hack	
Flake	AZ	Chandler	Morse	

S E C R E T

Franken	MN	Jeff	Lomonaco	
Gardner	CO	Natalie	Rogers	
Gillibrand	NY	Jess	Fassler	
Graham	SC	Richard	Perry	
Grassley	IA	Jill	Kozeny	
Harris	CA	Nathan	Barankin	
Hassan	NH	Marc	Goldberg	
Hatch	UT	Matt	Sandgren	
Heinrich	NM	Joe	Britton	
Heitkamp	ND	Tessa	Gould	
Heller	NV	Mac	Abrams	
Hirono	HI	Betsy	Lin	
Hoeven	ND	Ryan	Bernstein	
Inhofe	OK	Luke	Holland	
Isakson	GA	Joan	Kirchner Carr	
Johnson	WI	Tony	Blando	
Kaine	VA	Mike	Henry	
Kennedy	LA	Preston	Robinson	
King	ME	Kay	Rand	
Klobuchar	MN	Brigit	Helgen	
Lankford	OK	Greg	Slavonic	
Leahy	VT	JP	Dowd	
Lee	UT	Allyson	Bell	
Manchin	WV	Pat	Hayes	
Markey	MA	Paul	Tencher	
McCain	AZ	Truman	Anderson	
McCaskill	MO	Julie	Dwyer	
McConnell	KY	Phil	Maxson	
McConnell	KY	Sharon	Soderstrom	
Menendez	NJ	Fred	Turner	
Merkley	OR	Michael	Zamore	
Moran	KS	Brennen	Britton	
Murkowski	AK	Mike	Pawlowski	
Murphy	CT	Allison	Herwitt	
Murray	WA	Mike	Spahn	
Nelson	FL	Susie	Perez Quinn	
Paul	KY	William	Henderson	
Perdue	GA	Derrick	Dickey	
Peters	MI	Eric	Feldman	
Portman	OH	Mark	Isakowitz	
Reed	RI	Neil	Campbell	
Risch	ID	John	Sandy	
Roberts	KS	Jackie	Cottrell	

Rounds	SD	Rob	Skjonsberg	
Rubio	FL	Clint	Reed	
Sanders	VT	Michaelleen	Crowell	
Sasse	NE	Raymond	Sass	
Schatz	HI	Andrew	Winer	
Schumer	NY	Mike	Lynch	
Schumer	NY	Erin	Vaughn	
Scott	SC	Jennifer	DeCasper	
Shaheen	NH	Maura	Keefe	
Shelby	AL	Katie	Britt	
Stabenow	MI	Matt	VanKuiken	
Strange	AL	Kevin	Turner	
Sullivan	AK	Joe	Balash	
Tester	MT	Aaron	Murphy	
Thune	SD	Ryan	Nelson	
Tillis	NC	Ted	Lehman	
Toomey	PA	Dan	Brandt	
Udall	NM	Bianca	Ortiz Wertheim	
Van Hollen	MD	Karen	Robb	
Warner	VA	Mike	Harney	
Warren	MA	Dan	Geldon	
Whitehouse	RI	Sam	Goodstein	
Wicker	MS	Michelle	Richardson	
Wyden	OR	Jeff	Michels	
Young	IN	John	Connell	

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THE PEW CHARITABLE TRUSTS



Bipartisan Senate Chiefs of Staff Conference

The Pew Charitable Trusts

Invites You and Your Spouse
To the 6th Biennial

Senate Chiefs of Staff Management and Leadership Conference

Richmond, Virginia
September 15-17, 2017

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 15-17, 2017, in Richmond, Virginia. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the draft agenda is attached.

We will depart Union Station on Friday, September 15, at 2:30 p.m., on a reserved Amtrak car and return via bus on Sunday, September 17, arriving back at the Capitol at approximately 2:15 p.m. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. We invite your spouse to attend, however you must reimburse Pew for those expenses (estimated at around \$250).

Please [click here](#) to register, and we look forward to seeing you in historic Richmond this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

The Pew Charitable Trusts
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